

Field Types Explained: Configure User Profile Fields

Introduction

From the Admin side of the People application you can create new user profile fields.

These fields can then be chosen to display in different areas of the Intranet or not, depending on your aims.

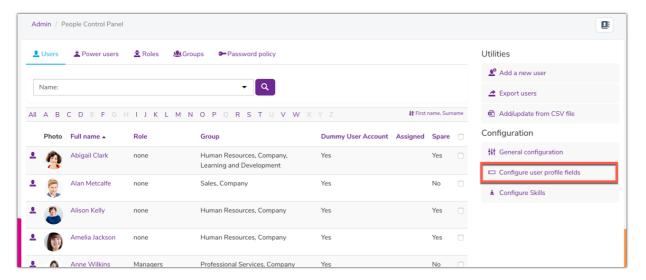
When adding a new user profile field there are various types available that are appropriate for certain types of data collection.

This guide will run through all types available and give an example of each can be used for to aid you in choosing the appropriate field for the outcome you desire.

Please note: You can choose to apply permissions to any of these fields to enable certain users/roles/groups to see them or update them. The ideas given for each field type in this guide are just examples of how they can be used without any permission restrictions. The most appropriate purpose for each which best suits your company will be up to you to decide upon and implement. Permissions can be applied to any fields you deem necessary to suit your best practices with employee information.

Getting started

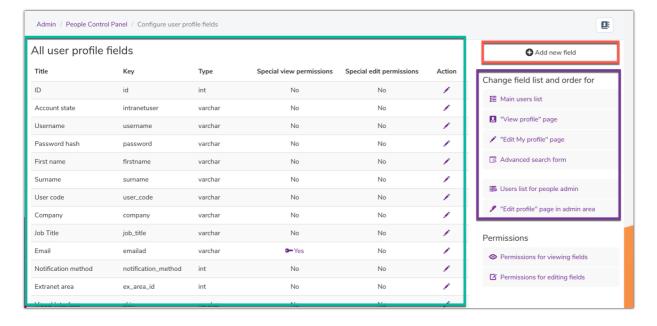
Head to Applications > Admin > People > Configure user profile fields



From this area (image below) you can see all the current user profile fields created in your Intranet (Green box)

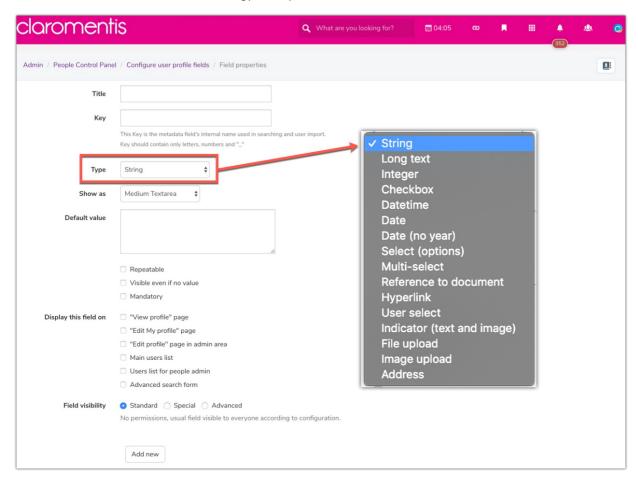
You can change which of these appear in other sections of your site using the tabs on the right (Purple box)

Right now, we are going to add a whole new field so will be clicking on 'Add new field' button (Red Box)



Field Types

From the 'add new field' screen the type dropdown lists all fields available in Claromentis.



Depending on the type that is selected different options will be given in the 'show as' field.

This denotes how the field will appear to the user when being filled in.

Optional aspects to consider if appropriate for your field:

Default Value - The information entered here will appear in your field on the front end before a user types anything in. This can be a helpful guide to show the user what kind of information they should be typing in.

Repeatable - Gives the option to add an extra field of the same configuration underneath the first instance on a profile. Up to 5 maximum for most fields types. Helpful if you wish to add multiple hyperlinks to a profile you can do so by repeating the field rather than creating a whole new one.

Visible even if no value - If selected your field will appear in the areas chosen even if nothing has been typed into it

Mandatory - A red asterisk will appear next to this field and the user must fill it in otherwsie they cannot save their profile page. Useful for important information you need every user to add and have on their profile.

Display this field on - You can choose any combination of Intranet areas listed that your field is going to show on by ticking the boxes.

For each field type listed in this guide there is an accompanying image (click to enlarge)

In each visualisation the numbers denote:

- 1. Configuration of field when in 'add new field area'
- 2. How field type appears to user filing it in on their profile
- 3. How field appears on user profile from the front end

- String

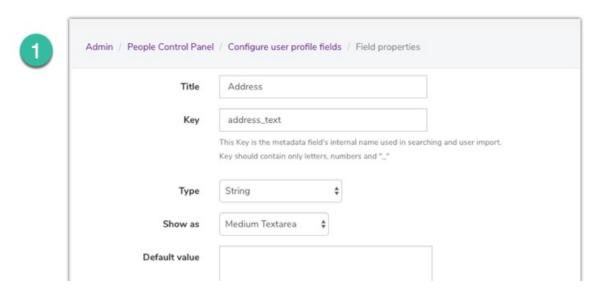
Used for text based inputs and likely the most commonly used field type on user profiles.

The options for showing this on the front end are as a single line, small text area or medium text area.

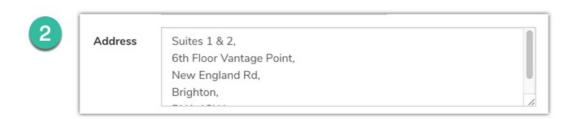
The one you select will depend on how much information you want/require the user to type into the field.

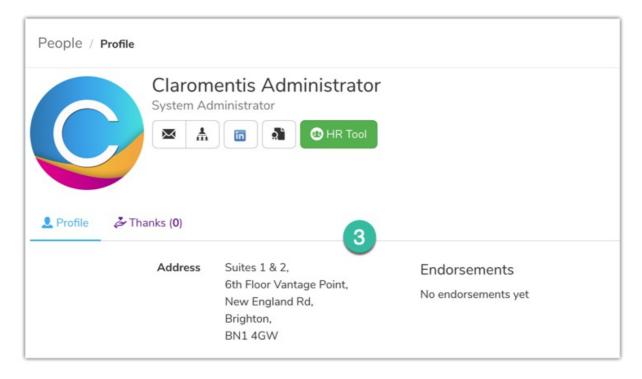
e.g. Use the string field to allow users to enter their own address.

This likely requires more than one line of data entry so you can set this to display as a medium text field giving the user more room to enter their details.



	Repeatable
	✓ Visible even if no value
	☐ Mandatory
Display this field on	☑ "View profile" page
	"Edit My profile" page
	"Edit profile" page in admin area
	☐ Main users list
	☐ Users list for people admin
	Advanced search form
Field visibility	Standard
	No permissions, usual field visible to everyone according to configuration.
	Save changes



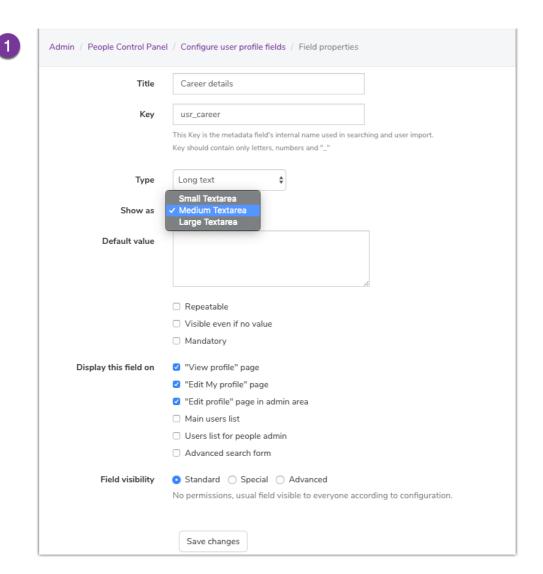


- Long text

This field type allows text based input that is best suited to fields that desire longer passages of text as answers.

The 'show as' options here are a small, medium or large text area dependant on how long you wish users responses to be.

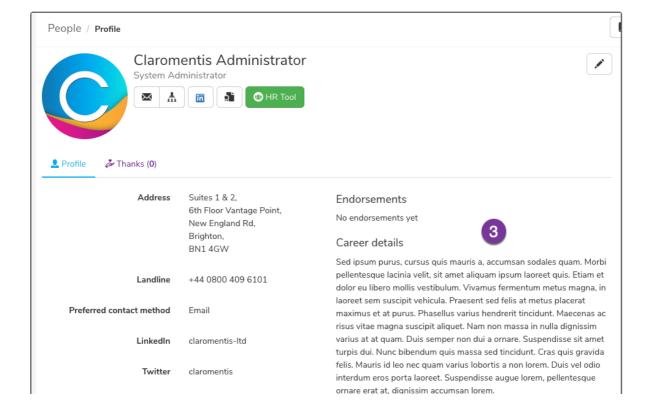
e.g. Use the long text field to allow users to freely write about their career details or interests.



2

Career details

Sed ipsum purus, cursus quis <u>mauris</u> a, <u>accumsan sodales quam</u>. Morbi <u>pellentesque</u> lacinia <u>velit</u>, sit <u>amet aliquam</u> ipsum <u>laoreet</u> quis. Etiam et dolor eu libero mollis <u>vestibulum</u>. <u>Vivamus</u> fermentum <u>metus</u> magna, in <u>laoreet</u> sem <u>suscipit vehicula</u>. <u>Praesent</u>



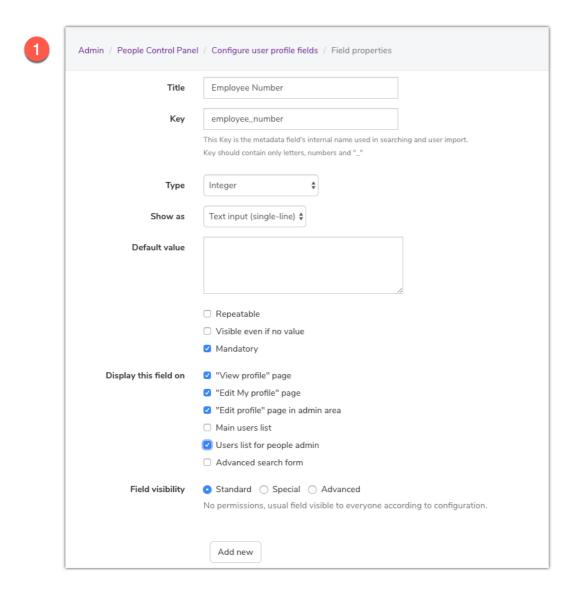
- Integer

This field type allows numerical characters to be entered only.

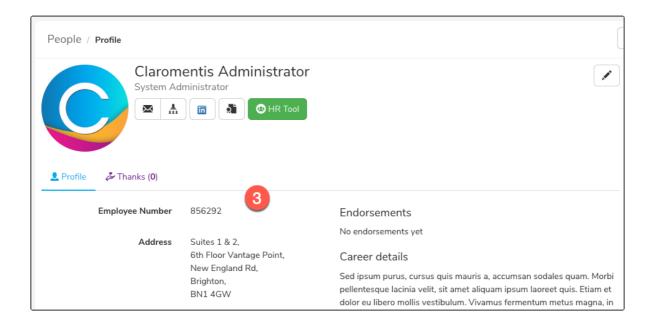
The sole option for display on the front end is for a single line of text input.

e.g. Use this field type to hold each users employee number

(You could also use a string type field to achieve this if special characters are required in the employee number and not strictly numerical values)

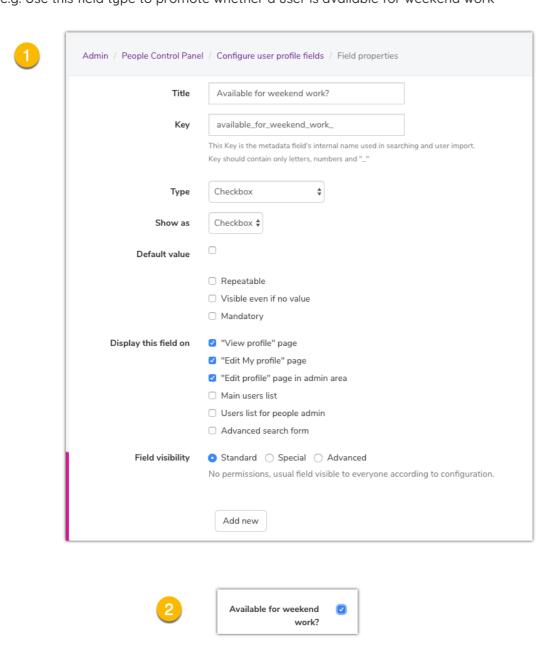


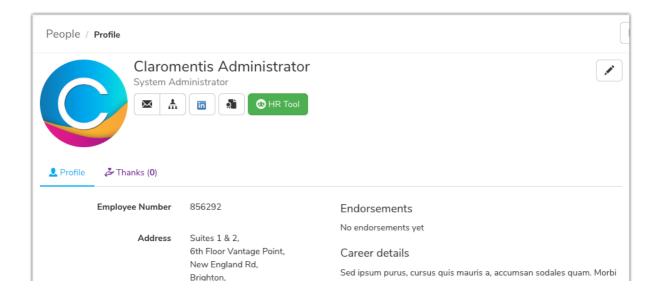




This field type is a box that can be selected (ticked) or deselected (blank) by users in response to what the field name is asking of them.

A ticked box will appear as a 'yes' on the front end and a deselected box as a 'no' e.g. Use this field type to promote whether a user is available for weekend work





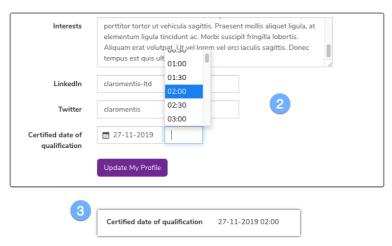


- Date time/Date/ Date (no year)

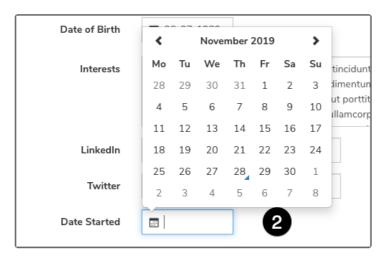
These three fields will all appear as date picker's on the front end so for this field type only images 2 & 3 will be given.

The granular configuration of each is slightly different based on what information they will require to be entered.

• Date time will ask the user to select a date but also enter a time e.g. when a qualification was gained (likely used in conjunction with another field above it)

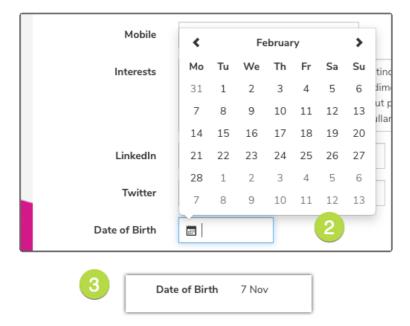


• Date will ask the user to select a date and the year will also show on the front end e.g. use this to show a users start date at the company





• Date (no year) offers a date to be selected but the year will not show on the front end ever e.g. useful to log users birthdays but not reveal their age to other users



- Select (options)

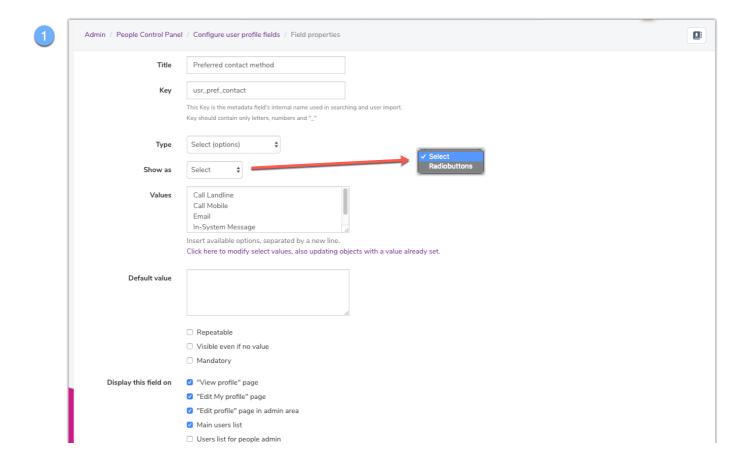
This field type allows several answers to be entered in response to the field name prompt.

A user selects one of these which then appears on the front end.

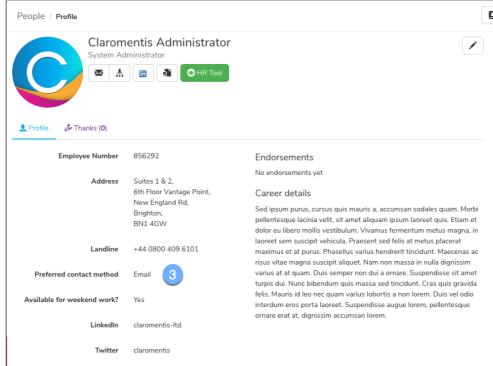
The 'show as' options are for answers to display in a drop down or as radio buttons when a user is making their choice.

Regardless of the design option chosen the answer will appear in the same format on a user's profile from the front end.

e.g. Use this field type to confirm a users preferred contact method







- Multi-select (options)

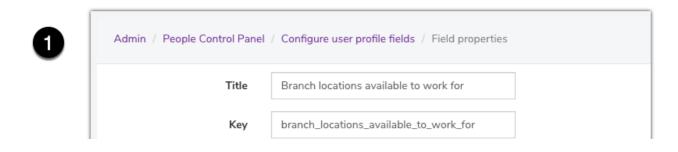
This field type allows several answers to be entered in response to to the field name prompt (as with the select field above)

However with this field type the user can select multiple responses to appear on the front end.

The 'show as' options are for answers to display in a list (multi-select) or as checkboxes.

Regardless of the design option chosen the answers will appear in the same format on a user's profile from the front end.

e.g. Use this field type to confirm a which locations a user is available to work at

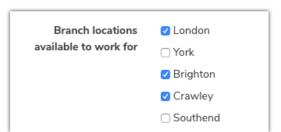


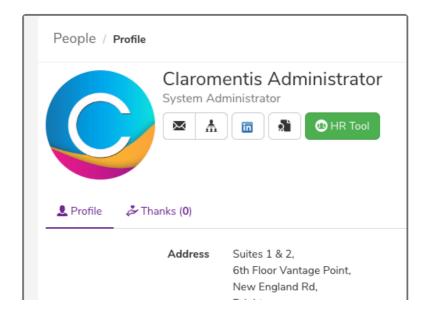
Branch locations
available to work for

London
York
Brighton
Crawley
Southend

or

Advanced search form





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- Reference to document

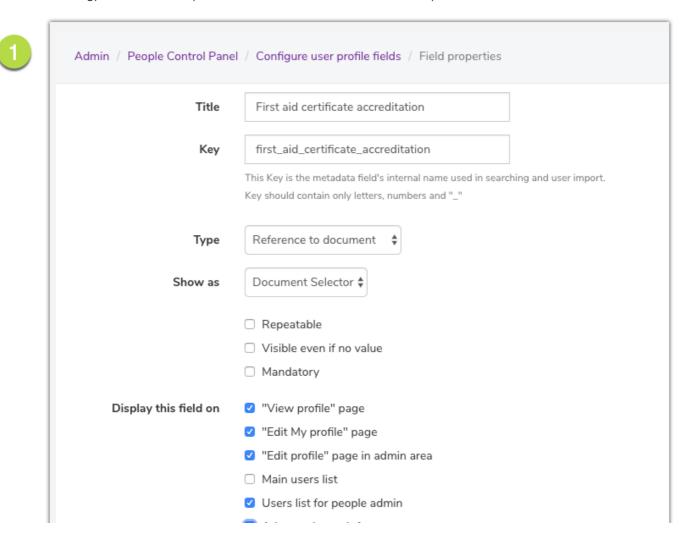
This field type offers a document picker for the user to select a file from the documents application which appears on their profile.

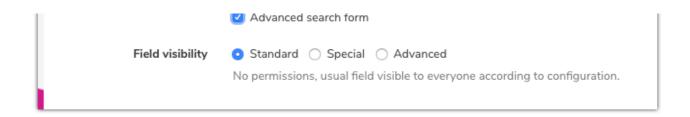
This only comes in one 'show as' form which is the picker box.

Once on a user profile from the front end, the blue 'I' when clicked will take the user to the document preview in the application and clicking the title will download the file.

Please note: if users don't have permissions to view the document it cannot be selected and any other user visting the profile wont be able to download/see it without permissions either.

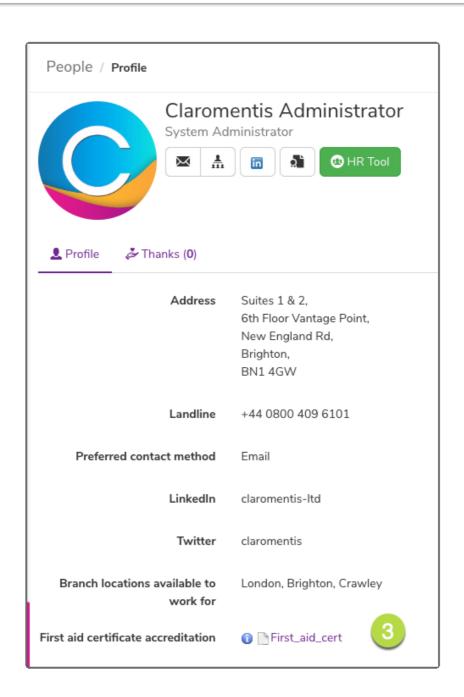
e.g. use this field type to attribute qualifications or certificates to a user's profile





2

First aid certificate accreditation Select document



- Hyperlink

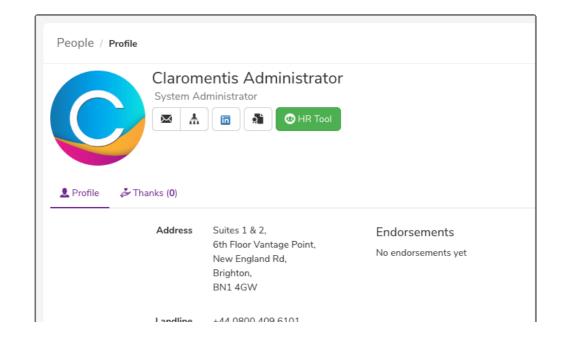
This field can only be displayed as a hyperlink which is configured as a custom clickable title set to lead to a desired URL.

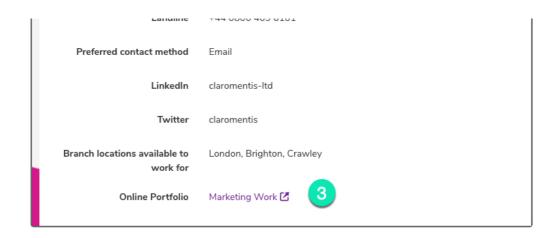
Once on a user profile from the front end, the title entered will take the user to the URL when clicked.

e.g. use this field type to allow user portfolio's or published online content to be attributed to their profile for other users to engage with

Admin / People Control Pane	el / Configure user profile fields / Field properties
Title	Online Portfolio
Key	online_portfolio
	This Key is the metadata field's internal name used in searching and user import. Key should contain only letters, numbers and "_"
Туре	Hyperlink \$
Show as	Hyperlink \$
Default value	
	□ Repeatable
	☐ Visible even if no value
	☐ Mandatory
Display this field on	☑ "View profile" page
	☑ "Edit My profile" page
	☑ "Edit profile" page in admin area
	☐ Main users list
	Users list for people admin
	☐ Advanced search form
Field visibility	• Standard Special Advanced
	No permissions, usual field visible to everyone according to configuration.
	Save changes







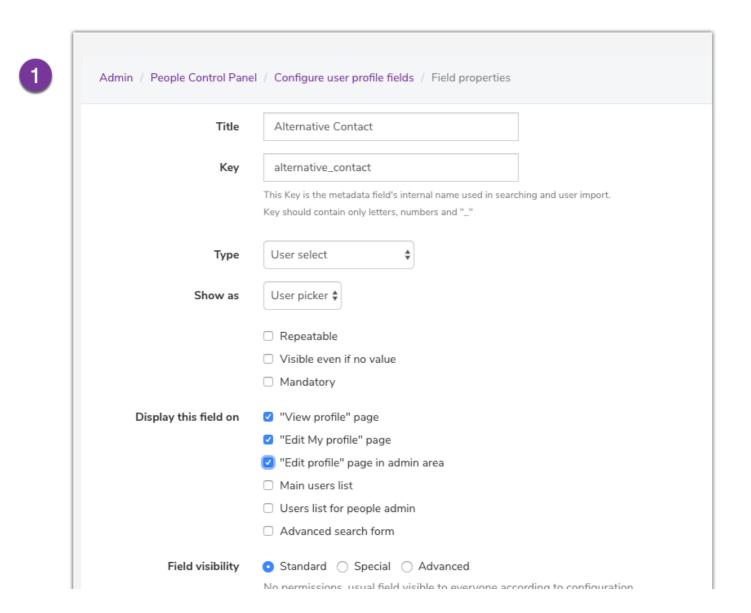
- User Select

This field can only be displayed as a user picker which allows another user with an Intranet profile to be selected and displayed.

The picker allows the user to type a name in and make a selection or click 'browse' to open a list and choose from it.

Once on a user profile from the front end, the user name entered becomes a link that leads to their profile.

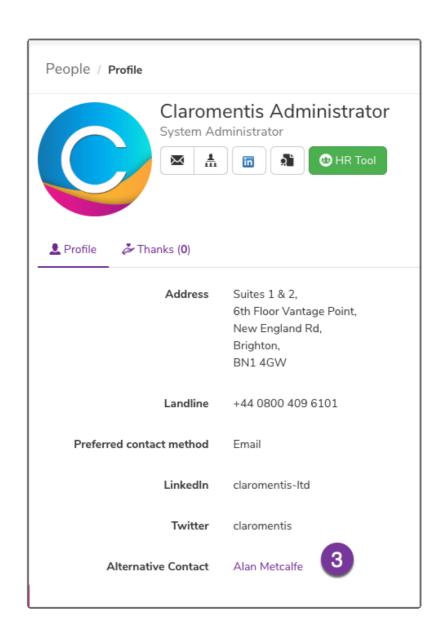
e.g. use this field type to push an alternative contact for issues the original user cannot take on in their absence or if they cannot currently be reached.





2





- Indicator (text and image)

This field type can be used to allow a user to make a selection from 5 options to demonstrate their feeling on the given meteric.

Text is accompanied by an image that allows the user to make an informed selection.

e.g. Use this field type for work satisfaction or rate the relationship with a partner/client.

Within Claromentis there are two default sets of text and images that will work to suit the two aims above, with

images of smileys and stars respectively.

The 'show as' options are as a select field or radio butttons.

Using radio buttons will ensure the image is displayed next to each option, whereas select is only text based.

You can use the text given below to enter into the 'values' field for:

Smileys

Poor,/images/satisfaction/poor.png

Low,/images/satisfaction/low.png

Medium,/images/satisfaction/med.png

High,/images/satisfaction/high.png

Max,/images/satisfaction/max.png

Stars

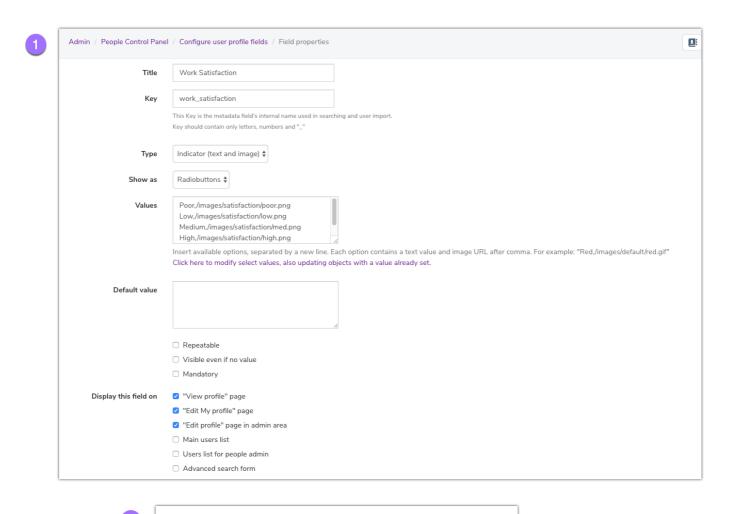
one,/images/star/1.png

two,/images/star/2.png

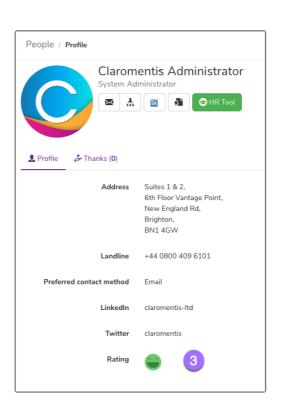
three,/images/star/3.png

four,/images/star/4.png

five,/images/star/5.png



O-- None -- Poor Low Medium High O Max



Work Satisfaction

- File Upload

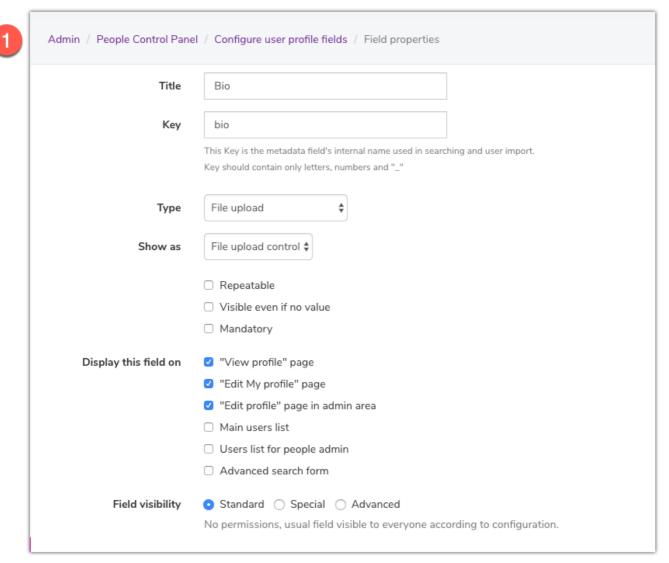
This field type can be used to allow users to attribute documents to their profile that are uploaded from their personal computer (rather than those held in the intranet's document application like the 'reference document'

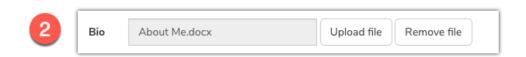
field type requires)

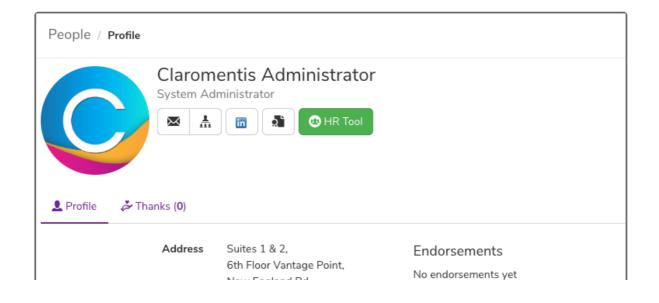
This appears as a file upload field and a clickable link on the user profile from the front end.

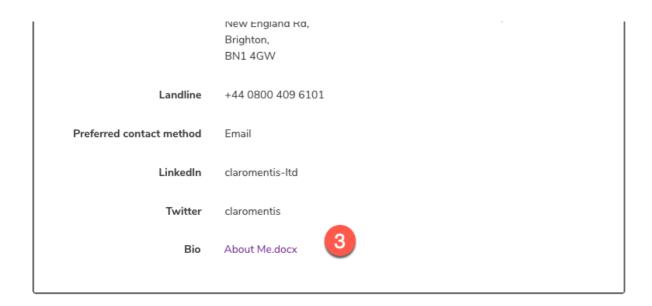
The document will be downloaded when it's title is clicked.

e.g. use this field type to allow users to attribute a bio they have written about themselves







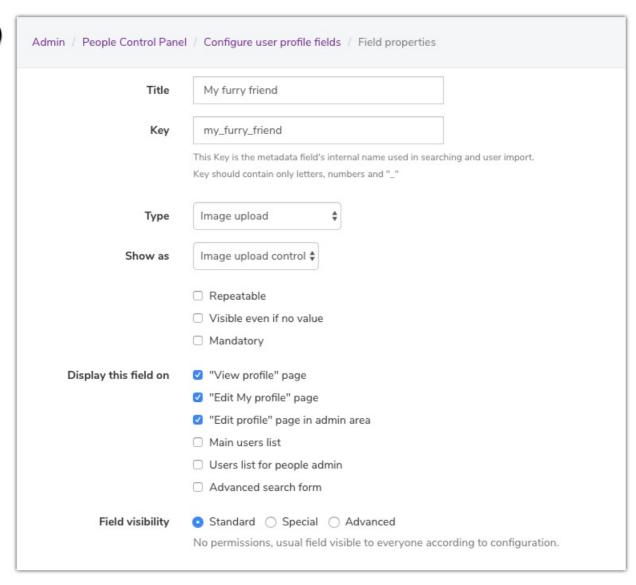


- Image upload

This field type allows an image from the users personal computer or one stored in the documents application to display on their profile.

e.g use this field to allow users to upload images of their pets, families, sports clubs they are a part of or a favourite work related image

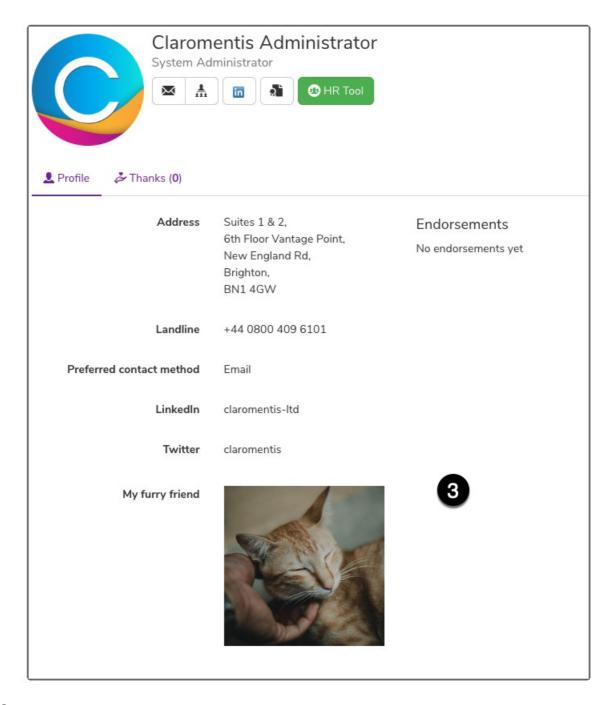






My furry friend

■ Upload image



- Address

This field type seperates each part of an address (town/city, state/county, postcode/ZIP, country) into fields, which is called the 'show as' address input format.

This is an alternative field to use for addresses specifically.

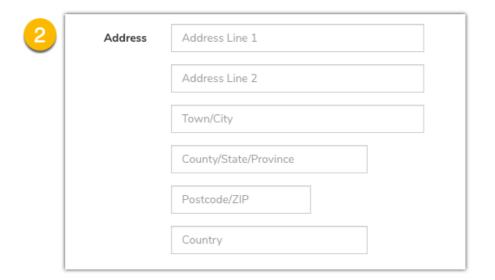
You can use a string type field to allow addresses to be entered by users as outlined earlier in this guide.

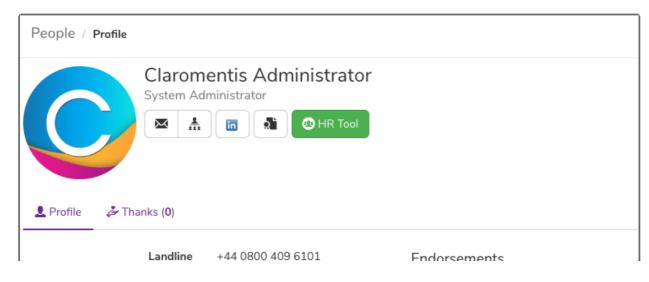
e.g. Use this field for a users home address (rather than using a string field) or to add an additional business address



Admin / People Control Panel / Configure user profile fields / Field properties		
Title	Address	
Key	address This Key is the metadata field's internal name used in searce	hing and user import.

	Key should contain only letters, numbers and "_"
Туре	Address
Show as	Address input \$
Default value	
	□ Repeatable
	☐ Visible even if no value
	☐ Mandatory
Display this field on	✓ "View profile" page
	✓ "Edit My profile" page
	✓ "Edit profile" page in admin area
	☐ Main users list
	☐ Users list for people admin
	☐ Advanced search form
Field visibility	Standard
	No permissions, usual field visible to everyone according to configuration.





LITAUTSCHICH

No endorsements yet

Preferred contact method Email

LinkedIn claromentis-Itd

Twitter claromentis

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